






# System Conventions

## 1 System Conventions










This page provides definitions for the page validation/message symbols as well as information on searching, filtering, and sorting.

### 1.1 Page Validation/Message Symbols



Symbol	Denotes
	<b>Rigid Validation:</b> When an error proceeded by the red X icon is displayed, data must be corrected before the system can save the page content. If one or more errors of this kind appear on the page and are not corrected, the system will not allow you to proceed.  <b>Example:</b> Entering “two” in a field where a numeric value (“2”) is required will produce a rigid validation. Also, not providing data in a required field displays a rigid validation.
	<b>Non-rigid Validation:</b> When an error proceeded by the red yield sign is display, there is an issue with the data entered on the page. You can still save the data, however, I the data isn't corrected, the system won't move the status to “Completed”.  <b>Example:</b> Entering no information in a field where data entry is required may produce a non-rigid validation. If these errors occur while updating the budget sheet on a proposal, for instance, the budget sheet will not be marked as complete and you will not be able to submit the proposal.
	<b>Warning:</b> When an error proceeded by the yellow yield sign with an exclamation point is displayed there is either a discrepancy or inconsistency in the information entered. Such errors must be corrected or justified.
	<b>Note:</b> When the blue box with the “i” is displayed the following message will provide information about the page you are viewing. The information may help you complete the action or task you are accessing.
	<b>Success Message:</b> The green check mark indicates success. The success message is generally displayed when you have completed an action or task.




### 1.2 System Icons

#### 1.2.1 Icons to be used in the Context Menu.












Icon	Definition
	Action History
	Attachments
	Emails
	Folders
	PDF
	Popup
	Remove
	TOC
	Update/Edit

#### 1.2.2 Icons to be used for the messages on the top of the page.




Icon	Definition
	Success
	Confirmation

	Error
	Note
	Warning

### 1.2.3 Icons to be used in the floating tool bar.

Icon	Definition
	Save
	Save and Continue
	Continue
	Cancel
	Mark as Complete
	Submit
	Export to Excel
	Export to Word
	View Links
	Other Actions
	Close Window

### 1.2.4 Other Icons

Icon	Definition
	Create New
	Tooltip Help
	Update/Edit

## 1.3 Using Search Fields

When accessing data in PAMS, you may find that too many items are displayed and it is difficult to find the item you want to work with, whether it is a proposal, award, or even an institution.

Clicking the Search link above the grid on the list page will display your Search filters. The Basic Search Parameters are the most common search fields. By clicking on Advanced Search Parameters will allow you to enter additional search parameters.

You can enter one or multiple search field. Once you have entered the desired search criteria click **Search** to narrow your displayed results.

You can also save your Search, by entering a Search Name and clicking **Save Parameters**.

Search parameters change from page to page.

**My Awards - List**

This page lists all the Awards to which you have access. If you do not see an Award, click the Add Award to Portfolio link above the grid to request access. Under the (+ View More)

**Search Filters:**

**Basic Search Parameters**

Award Number like:

Project Title like:

Institution Name like:

Award Role: ☐ All ☐ CO-PI ☐ Other ☐ PI ☐ Point of Contact ☐ SRO/BO/AO

PM Last Name like:

PM First Name like:

**Advanced Search Parameters**

**Display Options**

Sort Method (Grid | Custom)

Search Name:  Save Parameters Search

[Add Award to Portfolio](#) [Detailed View](#) [Search](#) [Saved Searches](#)

156 items in 11 page(s)

Award Number	Project Title	Award Role	Most Recent Award Date	Award Status	Options
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## 1.4 Using Filters

Another way to narrow your list page results is by using the Filters included in the grid.

**My Awards - List**

This page lists all the Awards to which you have access. If you do not see an Award, click the Add Award to Portfolio link above the grid to request access. Under the (+ View More)

[Add Award to Portfolio](#) [Detailed View](#) [Search](#) [Saved Searches](#)

156 items in 11 page(s)

Award Number	Project Title	Award Role	Most Recent Award Date	Award Status	Options
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="text"/>

Text fields require that you enter text, click the filter icon, and select the appropriate option as seen below.

NoFilter
Contains
DoesNotContain
StartsWith
EndsWith

Date fields require that you enter a date, you can use the calendar provided to select the date. Once the date is entered click the filter icon and select the appropriate option as seen below.

NoFilter
EqualTo
GreaterThan
LessThan
GreaterThanOrEqualTo
LessThanOrEqualTo

Dropdown filters include a list of options to select from. The selectable values will change from page to page. Below you see the example from the My Awards page.

**Award Status**

All

All

Active

Inactive

If you apply filters you and want to remove them, click the Clear filters link above the grid.

**My Awards - List**

This page lists all the Awards to which you have access. If you do not see an Award, click the Add Award to Portfolio link above the grid to request access. Under the [\(+ View More\)](#)

[Add Award to Portfolio](#)
[Detailed View](#) | [Search](#) | [Saved Searches](#) ▼

Filters Applied (X Clear)

Page size: 15 Go

88 items in 6 page(s)